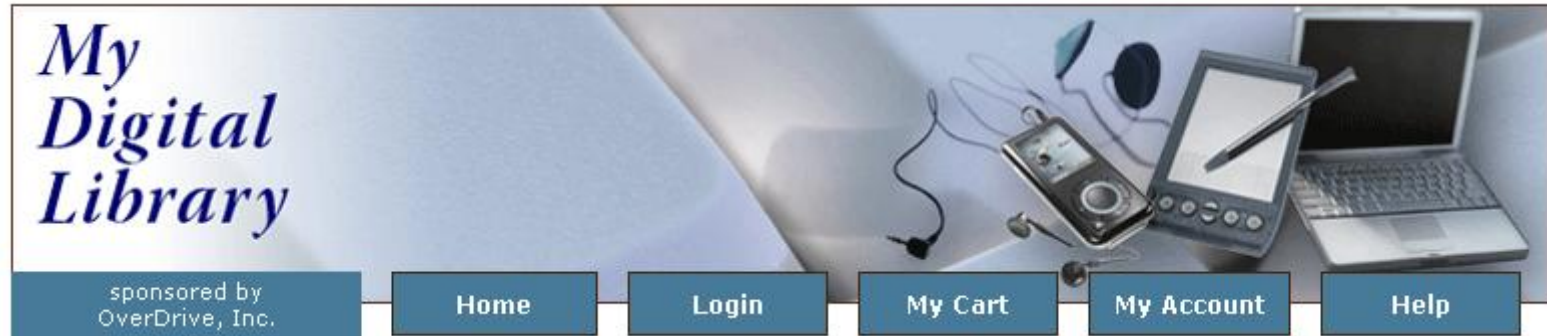**Real-Time Reports:** Size-up Success...and Stay on Track

In this training, we'll showcase reports which will best track circulation, new patrons, site traffic, and popular titles. Your team can then use these online reports to gauge how your Virtual Branch is doing, and track a path to future success.

Contact: training@overdrive.com.

Agenda

1. Introduction to Real-Time Reports.

2. Evaluate using Reports.

   ▶ **Selection Team**
     Evaluate your Digital Collection.

   ▶ **Marketing**
     Evaluate Promotions.

   ▶ **Administration**
     Evaluate Overall Success.

3. Goal Setting.

   ▶ **Selection Team**
     Build a Strong Collection.

   ▶ **Marketing**
     Reach New Patrons.

   ▶ **Administration**
      Size-Up Success.

4. Next Steps.

Introduction to Real-Time Reports

OverDrive

Getting Started

- ▶ Go to Content Reserve: www.contentreserve.com.

- ▶ Click on the 'Login' tab.

- ▶ Enter your Content Reserve 'Login ID' and 'Password'.
  This is the same Login ID / Password used to order titles.

Reports Page

Once logged in, click on the 'Reports' tab.

Tips for Reports

- ▶ **Share or print a report**: Many report results can be exported to an Excel spreadsheet. Click on 'Create Worksheet' from the results page.

- ▶ **Select multiple items:** Control-click to select multiple items in a field.

- ▶ **Consortia members:** Member libraries have the option to run many reports by library.

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Big Picture: Evolution of a Successful Virtual Branch

Track

Library Actions

Selection Team
Build a Strong Collection

Marketing
Reach New Patrons

Administration
Size-Up Success

Sample Reports:

▶ Activity Charts

▶ New Patron Registration

▶ Turnover Rate Charts

▶ Traffic Reports

▶ Current Waiting List

▶ Waiting List History

Review

OverDrive
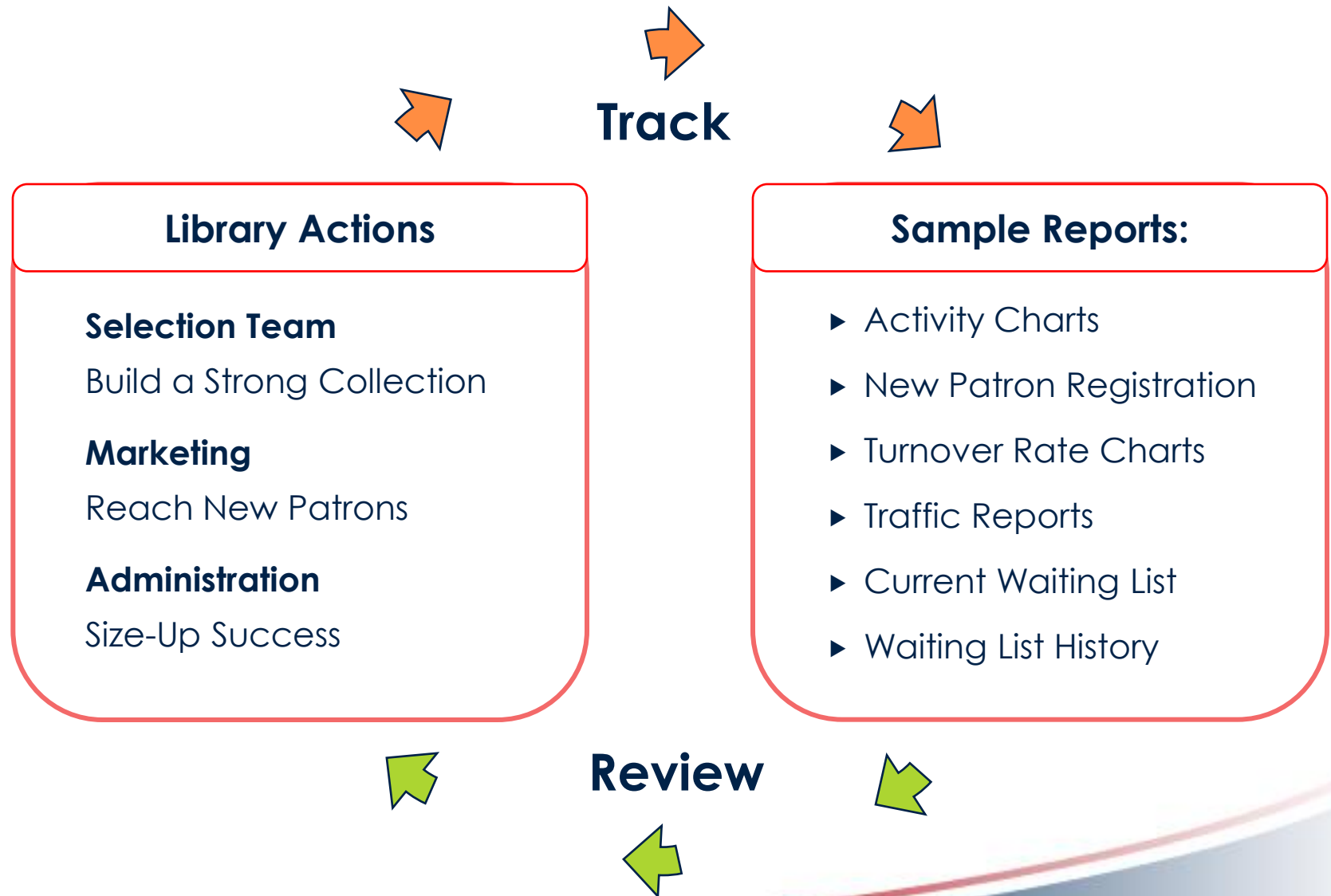
Recommended Review Schedule

Minimum Recommended Review Schedule:

▶ Monthly Review.

▶ Quarterly Review.

▶ Annual Review.

▶ Event Review.
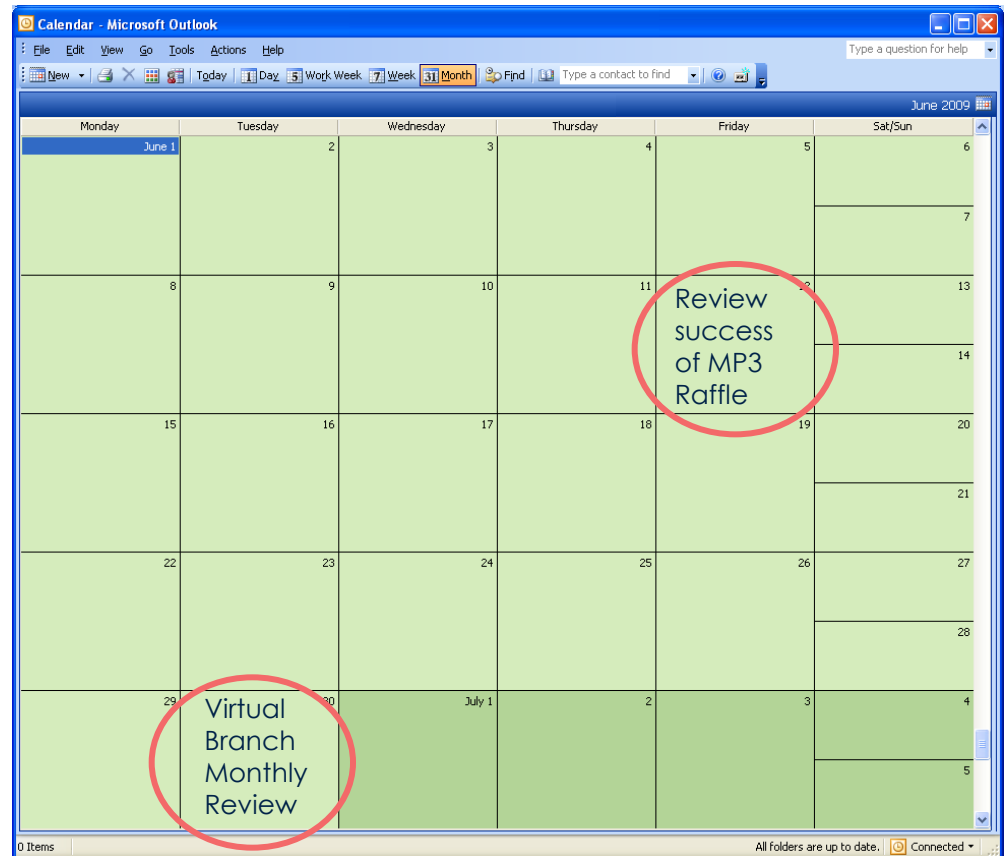
Demonstration

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Selection Team
Evaluate your Digital Collection

OverDrive

Evaluate your Digital Collection

Activity Charts

▶ See what content is already popular and make informed purchasing decisions.

Circulation Activity By Subject

From 1/1/2008 through 7/31/2008

Subject	Checkouts
Fiction	14636
Nonfiction	5632
Mystery	3667
Suspense	2122
Romance	2090
Thriller	2035
Juvenile Fiction	1459
Self-Improvement	1232
Business	765
Religion & Spirituality	658
History	639
Biography & Autobiography	573
Literature	572
Fantasy	561
Classic Literature	512
Science Fiction & Fantasy	471

Turnover Rate Charts

▶ Are you meeting patron demand for subjects, formats, and publishers?

▶ Compare circulation activity to turnover rate statistics.

Turnover Rate By Subject

From 1/1/2008 through 7/31/2008

Subject	Turnover Rate (Checkouts / Owned)
Recovery	6 (6/1)
Finance	5.53 (188/34)
Photography	5 (5/1)
Physics	5 (5/1)
Romance	4.14 (2090/505)
Young Adult Literature	4.13 (33/8)
Careers	4.06 (61/15)
New Age	3.85 (300/78)
Management	3.69 (118/32)
Current Events	3.60 (191/53)
Suspense	3.25 (2110/649)
Fantasy	3.21 (561/175)
Medical	3 (18/6)
Pets	3 (30/10)
Sociology	2.88 (46/16)
True Crime	2.81 (45/16)

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Evaluate your Digital Collection

Current Waiting List & Waiting List History

▶ Track your most requested titles and keep patrons satisfied.

▶ Compare the current waiting list to the waiting list history to see if a title has been 'in demand' over time.

Waiting List as of 8/13/2008 2:01:40 PM EST

	Title	Primary Creator	Publisher	ISBN	Format	Holds	Owned	Ratio	First Active Hold
1.	Brisingr (unabridged)	Christopher Paolini	Listening Library	9780739368107	OverDrive WMA Audiobook	6	1	6	06/30/2008
2.	Fearless Fourteen (unabridged)	Janet Evanovich	BBC Audiobooks America	9780792755579	OverDrive WMA Audiobook	6	1	6	06/24/2008
3.	Blood Brothers (unabridged)	Nora Roberts	Brilliance Audio	9781423337713	OverDrive WMA Audiobook	5	1	5	07/20/2008
4.	Against Medical Advice (unabridged)	James Patterson	Books on Tape	9781415954225	OverDrive WMA Audiobook	3	1	3	07/24/2008
5.	Amazing Grace (unabridged)	Danielle Steel	Brilliance Audio	9781423320159	OverDrive WMA Audiobook	3	1	3	07/31/2008
6.	Twilight (unabridged)	Stephenie Meyer	Listening Library	9780739345306	OverDrive WMA Audiobook	3	1	3	08/03/2008
7.	TailSpin (unabridged)	Catherine Coulter	Brilliance Audio	9781597108508	OverDrive WMA Audiobook	2	1	2	06/24/2008
8.	Atonement (abridged)	Ian McEwan	Phoenix Books		OverDrive WMA Audiobook	2	1	2	08/01/2008
9.	The Snowball (unabridged)	Alice Schroeder	Books on Tape	9781415948026	OverDrive WMA Audiobook	2	1	2	07/03/2008

Waiting List Activity By Title

All Branches

Title	Holds
Atonement (abridged)	15
Blood Brothers (unabridged)	14
The Choice (unabridged)	11
Fearless Fourteen (unabridg...	10
Winter Moon (unabridged)	9
Amazing Grace (unabridged)	9
Quicksand (unabridged)	8
High Noon (unabridged)	8
Honor Thyself (unabridged)	8
Odd Hours (unabridged)	8

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Marketing
Evaluate Promotions

OverDrive

Evaluate Promotions

Traffic Reports – Evaluate Everyday Promotional Efforts

▶ See what URLs are directing patrons to your Virtual Branch.

▶ Examples of URLs you should find here include your library's home page and online catalog.

Example Web Page Logo

Example OPAC Icon
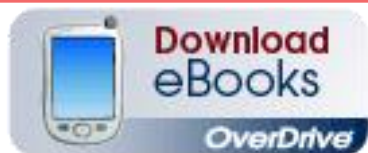
Website Traffic Report
(4/1/2008 - 6/30/2008)

Summary

Total page requests:	872074
Total patron sessions:	90222
Total patron referrals:	43944
Average monthly page requests:	290691
Average monthly patron sessions:	30074
Average monthly patron referrals:	14648
Average patron page visits:	10
Average patron session length:	20:30

Page Request Breakdown (monthly)

04/2008:	317485
05/2008:	306360
06/2008:	248229

Patron Session Breakdown (monthly)

04/2008:	49731
05/2008:	19609
06/2008:	20882

Patron Referral Breakdown (top 50)

1)	www.cpl.org:	9127
2)	search.clevnet.org:	5427
3)	search1.clevnet.org:	5028
4)	cpl.org:	2886
5)	www.google.com:	2577

Evaluate Promotions

New Patron Registrations

▶ Keep track of new patron registrations for your Virtual Branch because more patrons = more checkouts.

▶ Note: A 'registration' is counted the first time a patron signs in to your Virtual Branch website.

Patron Activity Charts

▶ View the number of different patrons that checked out titles by date or branch.

New Patrons By Month

All Branches

Through 7/31/2008

Date	Patrons
9/2006	483
10/2006	437
11/2006	341
12/2006	305
1/2007	396
2/2007	307
3/2007	393
4/2007	363
5/2007	285
6/2007	441
7/2007	503
8/2007	364
9/2007	300
10/2007	323
11/2007	323
12/2007	314
1/2008	394
2/2008	374
3/2008	372
4/2008	353
5/2008	395
6/2008	410
7/2008	493
Grand Total:	8,674 Patrons

Use both of these reports after promotional campaigns to compare percentage increases.

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Administration
Evaluate Overall Success

OverDrive

Evaluate Overall Success

Activity Charts

▶ Evaluate circulation progress and focus on goals. What percentage increase are you targeting?

▶ Where do you see positive growth, plateaus, or negative growth? What happened during those times?

New Patron Registrations

▶ Do the new patron registration trends mimic your activity trends?

▶ What percentage increase are you targeting?

Circulation Activity By Month

From 1/1/2008 through 11/30/2008

Date	Checkouts
1/2008	2462
2/2008	2735
3/2008	3108
4/2008	2990
5/2008	2746
6/2008	3050
7/2008	3597
8/2008	3480
9/2008	3525
10/2008	3794
11/2008	4027
Grand Total (11 Months):	35,514 Checkouts

New Patrons By Month

From 1/1/2008 through 11/30/2008

Date	Patrons
1/2008	225
2/2008	202
3/2008	223
4/2008	174
5/2008	160
6/2008	187
7/2008	248
8/2008	257
9/2008	239
10/2008	244
11/2008	332
Grand Total:	2,491 Patrons

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Evaluate Overall Success

Digital Library Statistics

▶ View a snapshot of statistics for your digital library: Overall and current checkouts, holds, and patrons, plus number of titles and copies in the collection.

▶ Each section includes total numbers as well as a break down by format.

▶ A great summary for quick evaluation or an annual report.

Digital Library Statistics

From inception to now | Select Date Range

- **Purchased Titles in Collection** (counting each format of a title only once): 3032
  - Adobe Reader: 323
  - OverDrive MP3 Audiobook: 297
  - OverDrive WMA Audiobook: 2412

Please note the 'Purchased Titles' do not include Max Access subscription titles.

- **Purchased Copies in Collection** (counting each copy of each format of a title): 3102
  - Adobe Reader: 325
  - OverDrive MP3 Audiobook: 297
  - OverDrive WMA Audiobook: 2480

Please note the 'Purchased Copies' do not include Max Access subscription titles.

- **Max Access Titles in Collection**: 25
  - OverDrive WMA Audiobook: 25

- **Maximum Access Subscriptions:**
  - 25 Blackstone Titles (Adult - Blackstone Max Access 20080528) containing 25 titles in OverDrive WMA Audiobook format. *Expires 06/03/2009.*

- **Checkouts:** 11097 (Current: 827)
  - Adobe Reader: 57 (Current: 55)
  - OverDrive MP3 Audiobook: 133 (Current: 132)
  - OverDrive WMA Audiobook: 10907 (Current: 640)

- **Holds:** 4530 (Current: 354)
  - Adobe Reader: 6 (Current: 6)
  - OverDrive MP3 Audiobook: 32 (Current: 31)
  - OverDrive WMA Audiobook: 4492 (Current: 317)

- **Unique Library Patrons Checking Out Titles:** 1981 (Current: 345)

OverDrive

Goal Setting

OverDrive

Selection Team: Build a Strong Collection

Action Item: Check your Patron Activity Chart and start setting goals.

Encourage activity by existing patrons by keeping your OverDrive download collection fresh.

▶ New titles.

▶ New formats.

▶ Additional copies of popular titles to shorten the hold period.
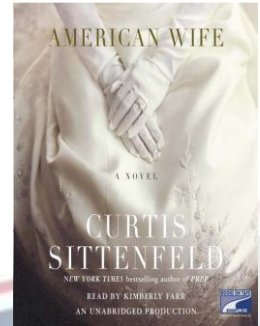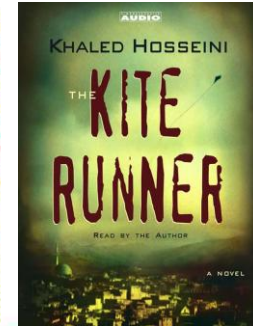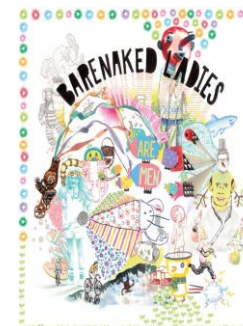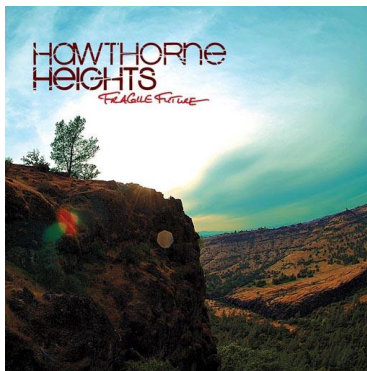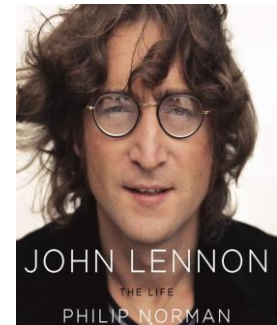
Marketing: Reach New Patrons

A significant majority of your community is unaware of your Virtual Library service.

- ▶ There are always more patrons to reach!

- ▶ Determine your library's ideal percentage growth and strive to increase your numbers month over month.

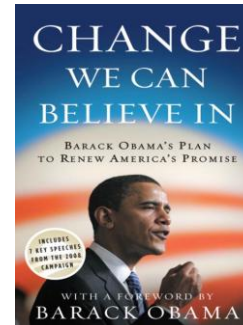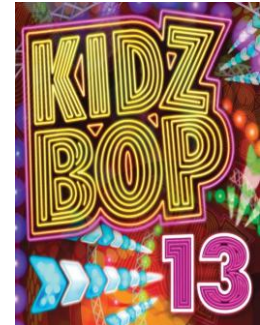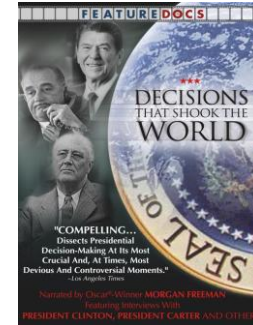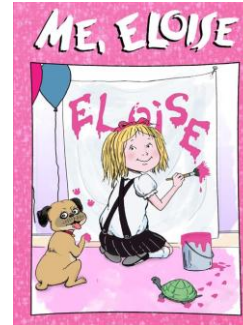- ▶ If one type of promotional campaign has been more successful than others, set goals for the next time you try the same campaign. Reach more patrons each time!

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Key chain for North Eastern Iowa Bridge to Online Resource Sharing.

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Administration: Size-Up Success

Challenge your library by making comparisons:

Compare your current statistics to statistics from last year and last quarter.

► Have your numbers increased as expected?

Consortia members - Compare library to library statistics.

► How does your library compare to libraries of a similar size?

Compare your OverDrive statistics to other online databases.

► How does your Virtual Branch stack up?

Circulation Activity By Branch

All Branches

Branch	Checkouts
LAW	23
EAST CLEVELAND	234
Other	557
HAWKEN	649
PENINSULA	846
CLYDE	1268
MILAN-BERLIN	1278
BELLEVUE	1297
BURTON	1303
FAIRPORT HARBOR	1317
KIRTLAND	1488
HURON	1548
PERRY	1553
WICKLIFFE	1943
RITTER	2182
WADSWORTH	3102
BIRCHARD	3211
ORRVILLE	3598
MADISON	5015
SANDUSKY	6076
EUCLID	6191
ELYRIA	7817
TWINSBURG	8483
WILLOUGHBY-EASTLAKE	8496
HUDSON	8786
Shaker Hts.	10630
LORAIN	12196
WAYNE	12312
CLEVELAND HTS-UNIVERSITY HT...	16568
MEDINA	17359
Cuyahoga County Public Libr...	33280
CLEVELAND	49363
Grand Total (32 Branches):	229,969 Checkouts

OverDrive®

Next Steps
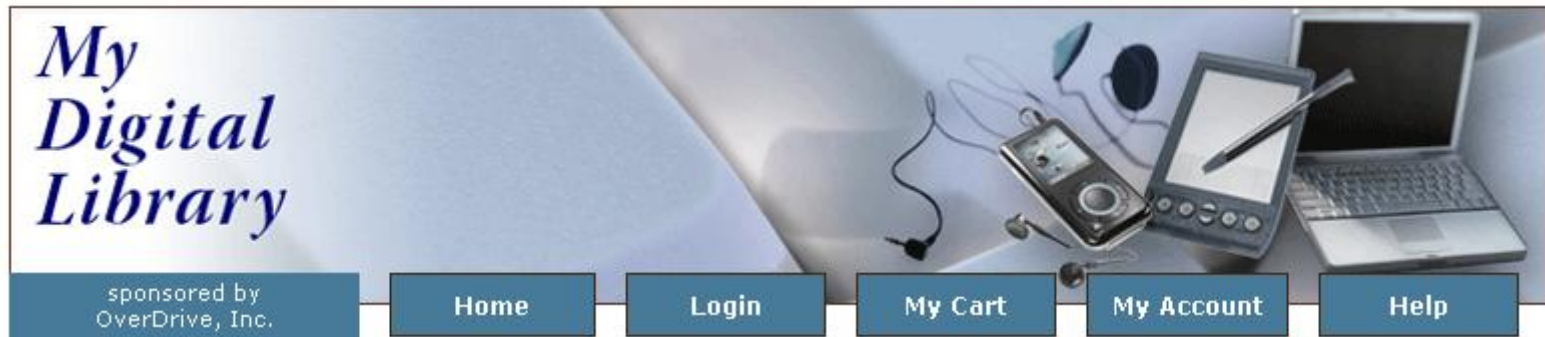
- ▶ Watch for our follow-up email.

- ▶ Check out OverDrive's Training Resources.

- ▶ Need help? Email us: support@libraryreserve.com.

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